

Guide to COUNTER Release 5 Reporting

OSA COUNTER 5 Portal Overview

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1) About COUNTER Release 5

Release 5 of the COUNTER Code of Practice is designed to balance changing reporting needs with the need to make things simpler, so that all content providers can achieve compliance and librarians can have usage statistics that are credible, consistent and comparable. For more information, please refer to the full [Code of Practice](#).

There are several different types of usage metric in Release 5, which breakdown into *investigations* and *requests*.

An investigation is tracked when a user performs any action in relation to a content item or title, while a request is specifically related to viewing or downloading the full content item (see Figure 1).

a. Metrics

Investigations

- ‘Total_Item_Investigations’: the total number of times a content item or information related to a content item was accessed.
- ‘Unique_Item_Investigations’: the number of unique content items (e.g. chapters) investigated by a user.
- ‘Unique_Title_Investigations’: the number of unique titles (e.g. books) investigated by a user.

Requests

- ‘Total_Item_Requests’: the total number of times the full text of a content item was downloaded or viewed.
- ‘Unique_Item_Requests’: the number of unique content items (e.g. chapters) requested by a user.
- ‘Unique_Title_Requests’: the number of unique titles (e.g. books) requested by a user.

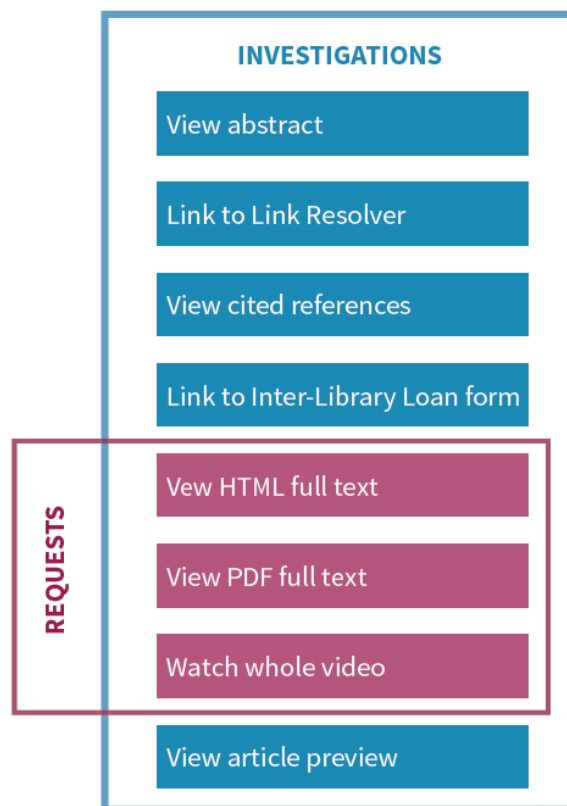


Figure 1: The relationship between “Investigations” and “Requests”

Access Denials

Access denials are sometimes known as turnaways. Two varieties of access denial metric are tracked in Release 5:

- ‘No_License’: counted when a user is unable to access a unique content item because their institution does not have a license to the content.
- ‘Limit_Exceeded’: counted when a user is unable to access a unique content item because their institution’s cap on the number of simultaneous users has been exceeded.

Searches

There are four different types of search metric in Release 5:

- ‘Searches_Regular’: the number of times a user searches a database, when they have actively chosen that database from a list of options OR there is only one database available to search.
- ‘Searches_Automated’: the number of times a user searches a database, when they have *not* actively chosen that database from a list of options. That is, Searches_Automated is recorded when the platform offers a search across multiple databases by default, and the user has not elected to limit their search to a subset of those databases.
- ‘Searches_Platform’: the number of times a user searches a database, regardless of the number of databases involved in the search.
- ‘Searches_Federated’: the number of times a search is run remotely by a computer.

b. Attributes and Parameters

Release 5 of the COUNTER Code of Practice has added a series of elements and attributes to our longer-standing metrics. These help to provide much more granular information in an organized way, as well as letting the COUNTER team maintain and amend the Code of Practice over time.

Briefly, the new elements are:

- ‘Data_Type’: used to group content at the level of the Title.
- ‘Section_Type’: used when Data_Types are delivered in small sub-units (e.g. journal articles).
- ‘Access_Type’: used to determine whether content was Open Access or not.

- ‘Access_Method’: applies when a Host allows Text and Data Mining (TDM) of their content, and is able to distinguish TDM activity from all other activity.
- ‘YOP’: Year of Publication, the four-digit year in which the Version of Record was published.

For full details please see the [Code of Practice](#).

c. COUNTER 5 reports

Release 5 of the COUNTER Code of Practice includes four Master Reports covering a very wide spectrum of activities:

- Platform Master Report
- Database Master Report
- Title Master Report
- Item Master Report

For ease of use, each of the Master Reports is associated with one or more summaries of particular types of activity, such as usage or access denials, called Standard Views. You can filter a Master Report to show a Standard View (or a custom view to suit your needs) using standard spreadsheet tools. Standard Views only hold a subset of the information from a Master Report, not the complete data set, so it is not possible to ‘unfilter’ a Standard View to obtain its parent Master Report.

2) Logging in

Go to <https://r5.osareports.org/> and enter username and password provided.

The Optical Society Usage Statistics Portal

Please sign in with your account.

User ID

Password

Sign In

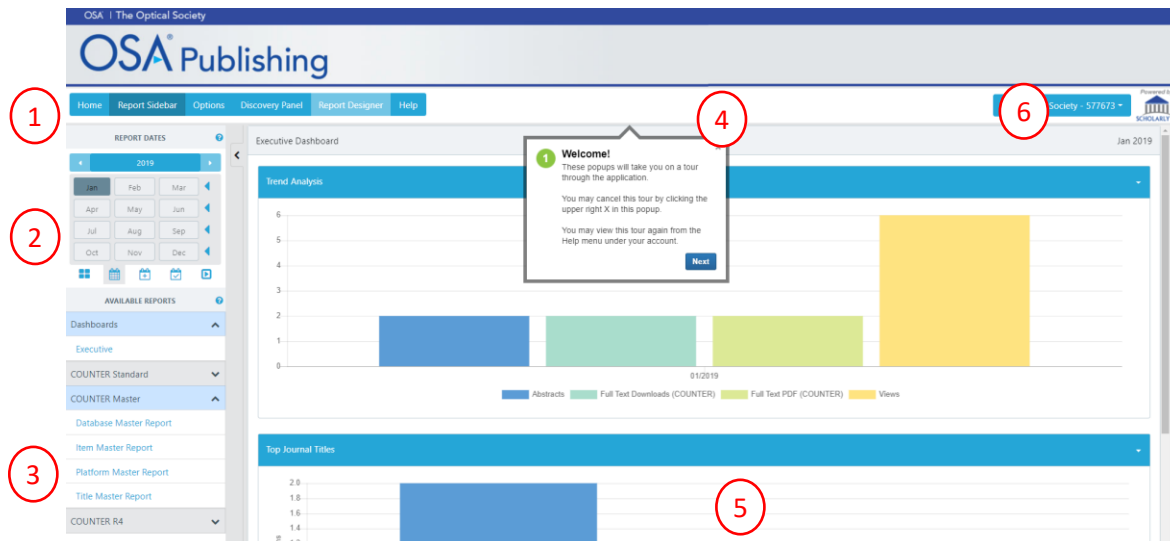
Version: 1.0.372

Powered by

3) Navigating within the portal

The OSA COUNTER 5 portal provided by Scholarly iQ (www.scholarlyiq.com) is designed to be as user-friendly and intuitive as possible whilst being compliant to the latest standards.

Once logged in you will be presented the following page with an Executive Dashboard to visualise key usage criteria.



Sample dashboard

The primary features of the reporting interface include:

- 1) Report Toolbar - the toolbar contains buttons allowing you to expand/collapse sidebars, change options, link to help and perform actions on your account such as SUSHI registration.
 - a. Home – click the Home button to return to the main page of the application
 - b. Report Sidebar – click the Report Sidebar to expand or collapse the left sidebar
 - c. Options – click the Options button to customise your preferences such as Rows Per Page and Chart Engine
 - d. Discovery Panel - click the Discovery Panel button to expand or collapse the right sidebar. The Discovery Panel allows you to add and remove filters, attributes, and metrics when a report is displayed
 - e. Report Designer - click the Report Designer button to change report parameters when a report is displayed
 - f. Help – click the Help button to link to support and help materials
- 2) Calendar – the calendar control allows you to apply date ranges to the active dashboard or report
- 3) Available Reports – this area lists the reports that are enabled for your account. Reports are grouped by category and clicking a report will display it with the active date range
- 4) Help Widget – the Help Widget can be selected from Help in the Report Toolbar or under Account Name to guide you through reporting steps and using the portal
- 5) Dashboard and Report Screen – displays the requested reports, data tables and charts
- 6) Customer Name – displays Customer Name and includes dropdown to links for Select Account, Help, SUSHI, Version and Sign Out

When a report is requested the following additional options are presented to the user:

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OSA Publishing

Home Report Sidebar Options Discovery Panel Report Designer Help

REPORT DATES

2019

Jan Feb Mar Apr May Jun Jul Aug Sep Oct Nov Dec

AVAILABLE REPORTS

Dashboards

Executive

COUNTER Standard

COUNTER Master

Database Master Report

Item Master Report

Platform Master Report

Title Master Report

COUNTER R4

Journal Report 1 (R4)

Journal Report 1 QDA (R4)

Title Master Report

Access Methods: All

Access Types: All

Attributes: All

Data Types: All

Granularity: Month

Item Identifiers: All

Metric Types: All

Section Types: All

VOP: All

1

2

3

4

5

6

Title	Publisher	Publisher_ID	Platform	DOI	Proprietary_ID	ISBN	Print_ISSN	Online_ISSN	URI	Metric_Type	Reporting_Period_Total
Applied Optics	Optical Society of America	Proprietary=OSA	OSA Publishing	10.1364/ao	OSAIO	1559-128X	2155-3185	2155-3185		Total_Item_Investigations	1
Applied Optics	Optical Society of America	Proprietary=OSA	OSA Publishing	10.1364/ao	OSAIO	1559-128X	2155-3185	2155-3185		Unique_Item_Requests	1
Optical Materials Express	Optical Society of America	Proprietary=OSA	OSA Publishing	10.1364/ome	OSAOME		2159-3930	2159-3930		Total_Item_Investigations	2
Optical Materials Express	Optical Society of America	Proprietary=OSA	OSA Publishing	10.1364/ome	OSAOME		2159-3930	2159-3930		Total_Item_Requests	1
Optical Materials Express	Optical Society of America	Proprietary=OSA	OSA Publishing	10.1364/ome	OSAOME		2159-3930	2159-3930		Unique_Item_Investigations	1
Optical Materials Express	Optical Society of America	Proprietary=OSA	OSA Publishing	10.1364/ome	OSAOME		2159-3930	2159-3930		Unique_Item_Requests	1
Optics Express	Optical Society of America	Proprietary=OSA	OSA Publishing	10.1364/oe	OSAOC		1094-4087	1094-4087		Total_Item_Investigations	1
Optics Express	Optical Society of America	Proprietary=OSA	OSA Publishing	10.1364/oe	OSAOC		1094-4087	1094-4087		Total_Item_Requests	1
Optics Express	Optical Society of America	Proprietary=OSA	OSA Publishing	10.1364/oe	OSAOC		1094-4087	1094-4087		Unique_Item_Investigations	1
Optics Express	Optical Society of America	Proprietary=OSA	OSA Publishing	10.1364/oe	OSAOC		1094-4087	1094-4087		Unique_Item_Requests	1

Page 1 of 1

10 rows

Sample report

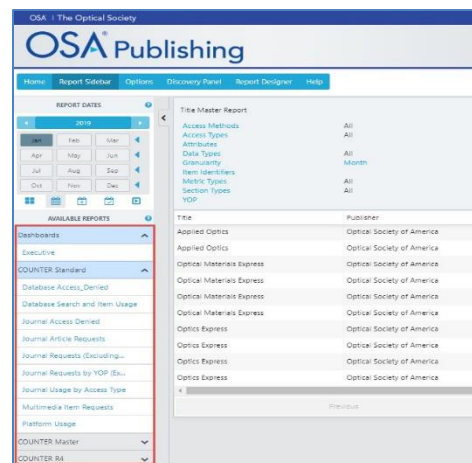
The additional features displayed within a report include

- 1) Report configuration – allows you to select/deselect report attributes and metrics (R5 only)
- 2) Report details – displays requested report table
- 3) Report navigation – allows you to navigate through report table and change number of rows displayed
- 4) Date – displays date range of active report
- 5) Search – allows you to search for specific line items such as ‘American National Biography’
- 6) Export – allows you to export data in report to CSV

4) Report selection

OSA customer usage reports are available in Dashboards, COUNTER Master, COUNTER Standard, COUNTER R4 and OSA Reports in the left hand sidebar.

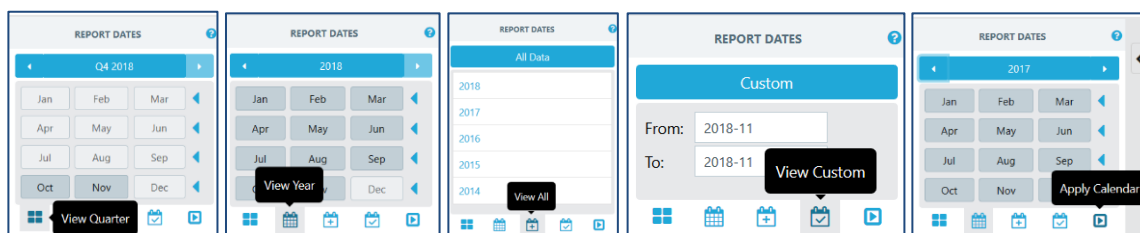
- Dashboards contain single page overviews of report data
- COUNTER Master reports can be dynamically filtered and changed
- COUNTER Standard reports are pre-configured and cannot be dynamically changed



Clicking on a report will display it with the active date range.

5) Calendar selection

Selection of date ranges from the Calendar control will apply the requested date range to the active dashboard or report.



6) Running a COUNTER 5 Master Report

COUNTER Master reports selected from Available Reports are designed to be able to show all available COUNTER metrics and attributes, and for these to be dynamically filtered and changed.

COUNTER 5 Master Reports can be customized by available attributes and metrics in 3 ways:

a. Report Configuration

The current report configuration is visible at the top of Master Reports. Clicking on an attribute allows you to edit or change which attributes and metrics are displayed in the report.

The screenshot shows the OSA Publishing Report Designer interface. A red box highlights the 'Select Data Types' dialog box, which is open over the 'Title Master Report' configuration. The dialog box has two columns: 'Available' and 'Selected'. The 'Available' column lists: Book, Newspaper or Newsletter, Other, Report, Thesis or Dissertation, and All. The 'Selected' column lists: Journal. The 'Continue' button is at the bottom of the dialog box. The background shows the 'Title Master Report' configuration with various filters and a table of report data.

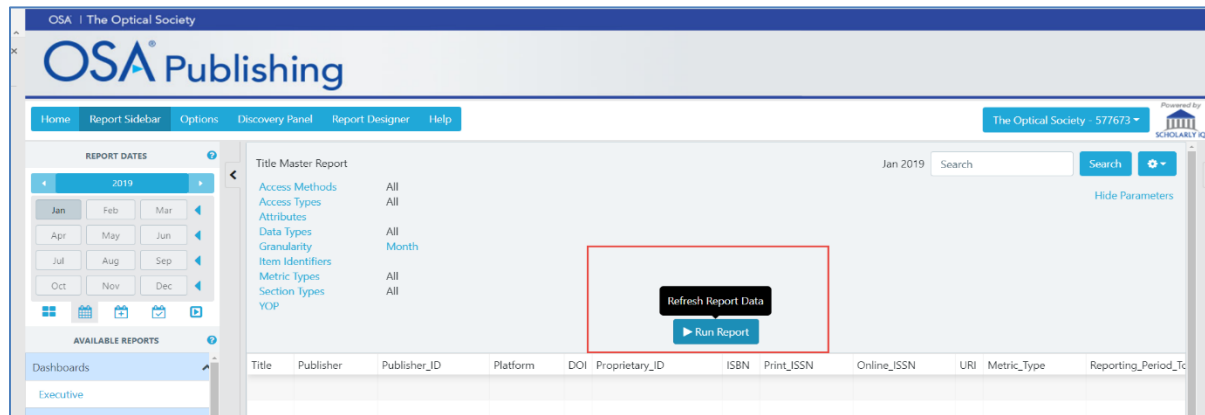
Title	Publisher	Publisher_ID	Platform	DOI	Proprietary_ID	ISBN	Print_ISSN	Online_ISSN	URI	Metric_Type
Applied Optics	Optical Society of America	Proprietary=OSA	OSA Publishing	10.1364/ao.	OSA:AO	1559-128X		2155-3165		Total_Item_Investigations
Applied Optics	Optical Society of America	Proprietary=OSA	OSA Publishing	10.1364/ao.	OSA:AO	1559-128X		2155-3165		Unique_Item_Investigations
Optical Materials Express	Optical Society of America	Proprietary=OSA	OSA Publishing	10.1364/ome.	OSA:OME			2159-3930		Total_Item_Investigations
Optical Materials Express	Optical Society of America	Proprietary=OSA	OSA Publishing	10.1364/ome.	OSA:OME			2159-3930		Total_Item_Requests
Optical Materials Express	Optical Society of America	Proprietary=OSA	OSA Publishing	10.1364/ome.	OSA:OME			2159-3930		Unique_Item_Investigations
Optical Materials Express	Optical Society of America	Proprietary=OSA	OSA Publishing	10.1364/ome.	OSA:OME			2159-3930		Unique_Item_Requests
Optics Express	Optical Society of America	Proprietary=OSA	OSA Publishing	10.1364/oe.	OSA:OE			1094-4087		Total_Item_Investigations
Optics Express	Optical Society of America	Proprietary=OSA	OSA Publishing	10.1364/oe.	OSA:OE			1094-4087		Total_Item_Requests
Optics Express	Optical Society of America	Proprietary=OSA	OSA Publishing	10.1364/oe.	OSA:OE			1094-4087		Unique_Item_Investigations
Optics Express	Optical Society of America	Proprietary=OSA	OSA Publishing	10.1364/oe.	OSA:OE			1094-4087		Unique_Item_Requests

Selecting available attributes or metrics allows you to add or remove which attributes or metrics are included in your next report.

This screenshot is similar to the previous one, but the 'Select Data Types' dialog box is now closed, and the 'Continue' button is visible. The background shows the 'Title Master Report' configuration with various filters and a table of report data.

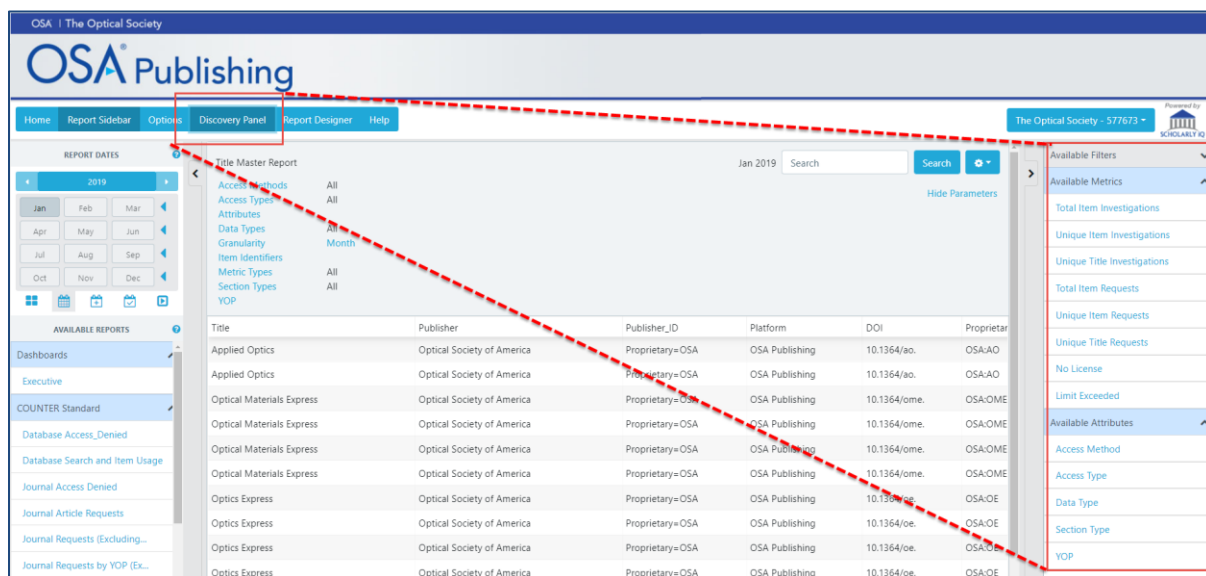
Title	Publisher	Publisher_ID	Platform	DOI	Proprietary_ID	ISBN	Print_ISSN
Applied Optics	Optical Society of America	Proprietary=OSA	OSA Publishing	10.1364/ao.	OSA:AO		1559-128X
Applied Optics	Optical Society of America	Proprietary=OSA	OSA Publishing	10.1364/ao.	OSA:AO		1559-128X
Optical Materials Express	Optical Society of America	Proprietary=OSA	OSA Publishing	10.1364/ome.	OSA:OME		
Optical Materials Express	Optical Society of America	Proprietary=OSA	OSA Publishing	10.1364/ome.	OSA:OME		
Optical Materials Express	Optical Society of America	Proprietary=OSA	OSA Publishing	10.1364/ome.	OSA:OME		

When all the required attributes and metrics are selected you can generate the report.



b. Discovery Panel

Clicking the Discovery Panel button in the top toolbar expands or collapses the right sidebar. The Discovery Panel allows you to add and remove filters, attributes, and metrics when a report is displayed



Selecting or drag and dropping attributes and metrics will add them to the selected Master report.

Clicking on a selected attribute or metric within the report configuration will remove the selected attribute or metric from the report.

c. Report Designer

The report designer also allows you to change report parameters when a report is displayed by opening a Report Description.

The screenshot shows the OSA Publishing Report Designer interface. The top navigation bar includes Home, Report Sidebar, Options, Discovery Panel, Report Designer (highlighted), and Help. The left sidebar shows the Report Dates (2019) and Available Reports (Journal Requests by YOP, Journal Usage by Access Type, Multimedia Item Requests, Platform Usage, COUNTER Master, Database Master Report, Item Master Report, Platform Master Report, Title Master Report). The main area displays the Title Master Report configuration. The Report Description section shows a list of attributes: Access Methods (All), Access Types (All), Attributes (All), Data Types (All), Granularity (Month), Item Identifiers (All), Metric Types (All), Section Types (All), and YOP (All). The main table displays the report data with columns: Title, Publisher, Publisher_ID, Platform, DOI, Proprietary_ID, ISBN, and Print_ISSN. The data rows show various report titles and their corresponding values.

The Report Description can be edited by selecting required attributes or parameters from within the report designer.

The screenshot shows the OSA Publishing Report Designer interface with the Select Section Types dialog box open. The dialog box has two columns: Available and Selected. The Available column lists Article, Book, Chapter, Other, and Section. The Selected column lists All. The dialog box also has a Continue button. The background shows the Report Designer interface with the Report Description section visible.

7) Running a COUNTER 5 Standard report

Selecting a COUNTER 5 Standard report from the COUNTER Standard report folder will generate a pre-configured COUNTER compliant version of that standard report. COUNTER 5 Standard reports are fixed and cannot be changed.

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OSA Publishing

HomeReport SidebarOptionsDiscovery PanelReport DesignerHelp

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REPORT DATES

Journal Usage by Access Type

Jan 2019

Search

Search

JanFebMarAprMayJunJulAugSepOctNovDec

AVAILABLE REPORTS

Dashboards

Executive

COUNTER Standard

Database Access Denied

Database Search and Item Usage

Journal Access Denied

Journal Article Requests

Journal Requests (Excluding...)

Journal Requests by YOP (Ex...)

Journal Usage by Access Type

Journal Usage by Access Type

TitlePublisherPublisher_IDPlatformDOIProprietary_IDISBNPrint_ISSNOnline_ISSNURIAccess_TypeMetric_TypeReport

Applied OpticsOptical Society of AmericaProprietary=OSAOSA Publishing10.1364/aoOSA-AO1559-128X2155-3165ControlledTotal_Item_Investigations1

Applied OpticsOptical Society of AmericaProprietary=OSAOSA Publishing10.1364/aoOSA-AO1559-128X2155-3165ControlledUnique_Item_Investigations1

Optical Materials ExpressOptical Society of AmericaProprietary=OSAOSA Publishing10.1364/omeOSA-OME2159-3930OAGoldTotal_Item_Investigations2

Optical Materials ExpressOptical Society of AmericaProprietary=OSAOSA Publishing10.1364/omeOSA-OME2159-3930OAGoldTotal_Item_Requests1

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PreviousPage 1 of 110 rowsNext

8) Exporting and saving data

Data from any report can be exported to CSV and saved locally.

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OSA Publishing

HomeReport SidebarOptionsDiscovery PanelReport DesignerHelp

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REPORT DATES

Jan 2019

JanFebMarAprMayJunJulAugSepOctNovDec

AVAILABLE REPORTS

Dashboards

Executive

COUNTER Standard

Database Access Denied

Database Search and Item Usage

Journal Access Denied

Journal Article Requests

Journal Requests (Excluding...)

Journal Requests by YOP (Ex...)

Journal Usage by Access Type

Journal Usage by Access Type

Jan 2019Search

SearchExport to CSVHelp

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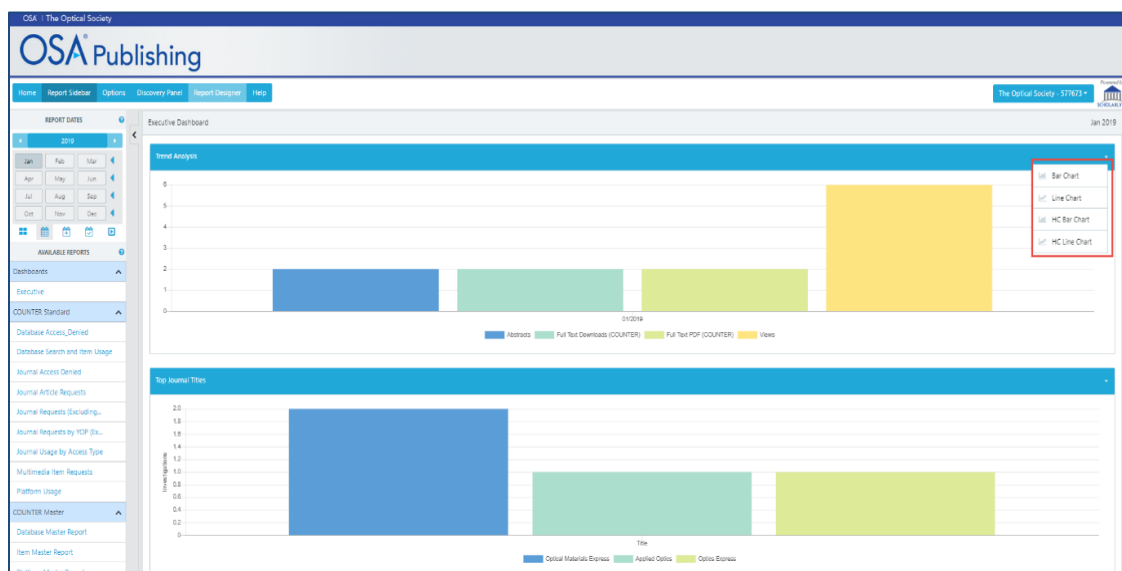
The report will be downloaded in COUNTER compliant format.

Title Master Report																	
A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R
1	Report_N	Title Master Report															
2	Report_ID	TR															
3	Release	5															
4	Institution	Client Demo Site															
5	Institution	DEMO:327139															
6	Metric_Ty	Total_Item_Investigations;Total_Item_Requests;Unique_Item_Investigations;Unique_Item_Requests;Unique_Title_Requests;Unique_Title_Investigations;Limit_Exceeded;No_License															
7	Report_Fil	Data_Type=Book Journal Newspaper or Newsletter Other Report Thesis or Dissertation															
8	Report_Attributes																
9	Exceptions																
10	Reporting_Begin_Date	=2016-03-01; End_Date=2016-03-31															
11	Created	2019-01-23T10:43:15Z															
12	Created_B	Scholarly iQ															
13																	
14	Title	Publisher	Publisher	Platform	DOI	Proprietar	ISBN	Print_ISSN	Online_ISS	URI	Metric_Ty	Reporting_	Mar-16				
15	Book 1715	Publisher 109		Platform 1		DEMO:171XXXX-1715					Total_Item	1	1				
16	Book 1715	Publisher 109		Platform 1		DEMO:171XXXX-1715					Total_Item	1	1				
17	Book 1715	Publisher 109		Platform 1		DEMO:171XXXX-1715					Unique_Ita	1	1				
18	Book 1715	Publisher 109		Platform 1		DEMO:171XXXX-1715					Unique_Ita	1	1				
19	Book 1715	Publisher 109		Platform 1		DEMO:171XXXX-1715					Unique_Ti	1	1				
20	Book 1715	Publisher 109		Platform 1		DEMO:171XXXX-1715					Unique_Ti	1	1				
21	Journal 10	Publisher 111		Platform 1		DEMO:10	XXXX-10	XXXX-10			Total_Item	20	20				
22	Journal 10	Publisher 111		Platform 1		DEMO:10	XXXX-10	XXXX-10			Total_Item	10	10				
23	Journal 10	Publisher 111		Platform 1		DEMO:10	XXXX-10	XXXX-10			Unique_Ita	13	13				
24	Journal 10	Publisher 111		Platform 1		DEMO:10	XXXX-10	XXXX-10			Unique_Ita	9	9				
25	Journal 11	Publisher 111		Platform 1		DEMO:11	XXXX-11	XXXX-11			Total_Item	6	6				
26	Journal 11	Publisher 111		Platform 1		DEMO:11	XXXX-11	XXXX-11			Total_Item	6	6				
27	Journal 11	Publisher 111		Platform 1		DEMO:11	XXXX-11	XXXX-11			Unique_Ita	6	6				

9) Additional features

The OSA COUNTER Release 5 portal includes a number of additional user-friendly features to aid report customisation.

- Change chart type in dashboard



- Change report rankings – click on column header (second click switches between ascending and descending)

OSA | The Optical Society

OSA Publishing

Home Report Sidebar Options Discovery Panel Report Designer Help

The Optical Society - 579031

Jan 2019 Search

REPORT DATES

2019

Jan Feb Mar Apr May Jun Jul Aug Sep Oct Nov Dec

View Custom

AVAILABLE REPORTS

Dashboards

Executive

COUNTER Standard

Database Access Denied

Database Search and Item Usage

Journal Access Denied

Journal Article Requests

Journal Requests (Excluding...)

Journal Requests by YOP (Ex...)

Journal Usage by Access Type

Multimedia Item Requests

Title Master Report

Access Methods All

Access Types All

Attributes All

Data Types All

Granularity Month

Item Identifiers All

Metric Types All

Section Types All

YOP All

Title	Publisher	Publisher_ID	Platform	DOI	Proprietary_ID	ISBN	Print_ISSN	Online_ISSN	URI	Metric_Type	Reporting_Period_Total
Applied Optics	Optical Society of America	Proprietary=OSA	OSA Publishing	10.1364/ao.	OSAJO	1559-128X	1559-128X	2155-3165		Total_Item_Investigations	1
Applied Optics	Optical Society of America	Proprietary=OSA	OSA Publishing	10.1364/ao.	OSAJO	1559-128X	1559-128X	2155-3165		Unique_Item_Investigations	1
Optical Materials Express	Optical Society of America	Proprietary=OSA	OSA Publishing	10.1364/ome.	OSAOME			2159-3930		Total_Item_Investigations	2
Optical Materials Express	Optical Society of America	Proprietary=OSA	OSA Publishing	10.1364/ome.	OSAOME			2159-3930		Total_Item_Requests	1
Optical Materials Express	Optical Society of America	Proprietary=OSA	OSA Publishing	10.1364/ome.	OSAOME			2159-3930		Unique_Item_Investigations	1
Optical Materials Express	Optical Society of America	Proprietary=OSA	OSA Publishing	10.1364/ome.	OSAOME			2159-3930		Unique_Item_Requests	1
Optics Express	Optical Society of America	Proprietary=OSA	OSA Publishing	10.1364/oe.	OSAEO			1094-4087		Total_Item_Investigations	1
Optics Express	Optical Society of America	Proprietary=OSA	OSA Publishing	10.1364/oe.	OSAEO			1094-4087		Total_Item_Requests	1
Optics Express	Optical Society of America	Proprietary=OSA	OSA Publishing	10.1364/oe.	OSAEO			1094-4087		Unique_Item_Investigations	1
Optics Express	Optical Society of America	Proprietary=OSA	OSA Publishing	10.1364/oe.	OSAEO			1094-4087		Unique_Item_Requests	1

Page 1 of 1

10 rows

- Drag and drop columns to change report layout

OSA | The Optical Society

OSA Publishing

Home Report Sidebar Options Discovery Panel Report Designer Help

The Optical Society - 579031

Jan 2019 Search

REPORT DATES

2019

Jan Feb Mar Apr May Jun Jul Aug Sep Oct Nov Dec

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Database Access Denied

Database Search and Item Usage

Journal Access Denied

Journal Article Requests

Journal Requests (Excluding...)

Journal Requests by YOP (Ex...)

Journal Usage by Access Type

Multimedia Item Requests

Title Master Report

Access Methods All

Access Types All

Attributes All

Data Types All

Granularity Month

Item Identifiers All

Metric Types All

Section Types All

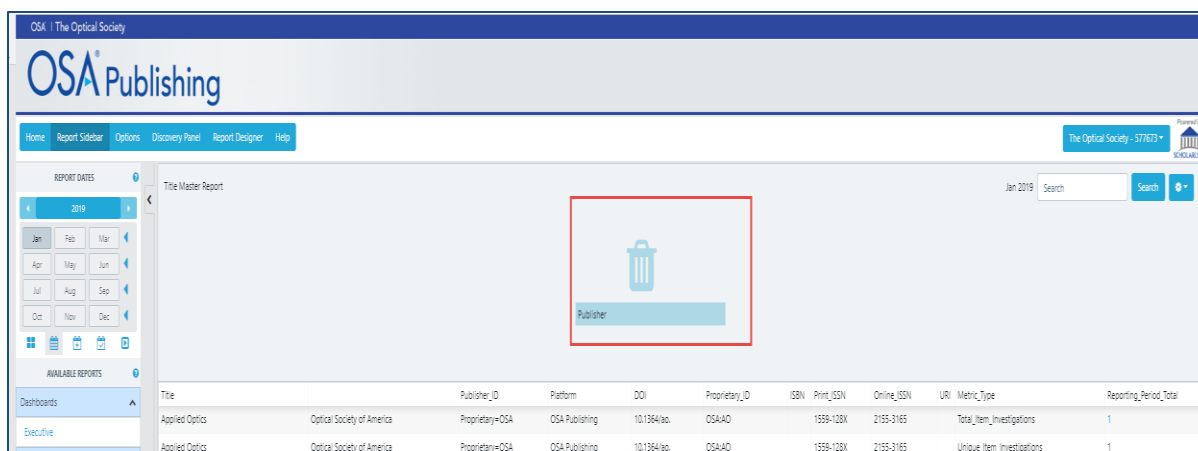
YOP All

Title	Publisher	Publisher_ID	Platform	DOI	Proprietary_ID	ISBN	Print_ISSN	Online_ISSN	URI	Metric_Type
Applied Optics	Optical Society of America	Proprietary=OSA	OSA Publishing	10.1364/ao.	OSAJO	1559-128X	1559-128X	2155-3165		Total_Item_In
Applied Optics	Optical Society of America	Proprietary=OSA	OSA Publishing	10.1364/ao.	OSAJO	1559-128X	1559-128X	2155-3165		Unique_Item
Optical Materials Express	Optical Society of America	Proprietary=OSA	OSA Publishing	10.1364/ome.	OSAOME			2159-3930		Total_Item_In
Optical Materials Express	Optical Society of America	Proprietary=OSA	OSA Publishing	10.1364/ome.	OSAOME			2159-3930		Total_Item_Re
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Optical Materials Express	Optical Society of America	Proprietary=OSA	OSA Publishing	10.1364/ome.	OSAOME			2159-3930		Unique_Item
Optics Express	Optical Society of America	Proprietary=OSA	OSA Publishing	10.1364/oe.	OSAEO			1094-4087		Total_Item_In
Optics Express	Optical Society of America	Proprietary=OSA	OSA Publishing	10.1364/oe.	OSAEO			1094-4087		Total_Item_Re
Optics Express	Optical Society of America	Proprietary=OSA	OSA Publishing	10.1364/oe.	OSAEO			1094-4087		Unique_Item
Optics Express	Optical Society of America	Proprietary=OSA	OSA Publishing	10.1364/oe.	OSAEO			1094-4087		Unique_Item

Page 1 of 1

10 rows

- Drag a column header up to remove the column from the report



10) Help

a. In portal help

Help materials, including the Help Widget are available within the reporting portal. Help is available from the Help button in the top toolbar or from the dropdown when you click on your account name.

b. OSA Customer Services

For most direct support issues please contact OSA Customer Services as follows:

Email: elec@osa.org

c. Scholarly iQ

For technical portal and SUSHI support issues please contact support@scholarlyiq.com.

11) SUSHI

R5 SUSHI Setup

The Standardized Usage Statistics Harvesting Initiative (SUSHI) protocol is an automated request and response model for harvesting usage data.

Users who have used SUSHI reports for COUNTER 4 reports will need to request new SUSHI credentials to access COUNTER 5 SUSHI reports. To access your COUNTER 5 compliant reports from OSA, simply follow the 5 easy steps to retrieve your SUSHI access credentials today. With these, you can begin harvesting usage reports using your preferred SUSHI ERM tool.

The OSA SUSHI web service is available 24 hours per day, 7 days a week. If you need assistance beyond the self-service SUSHI activation process, please contact the OSA Help Desk for further assistance.

Step 1

Go the OSA Librarian Resource Center at <https://www.osapublishing.org/library/#> and click on the COUNTER Reports Log In.

Or navigate to the reports directly at <https://r5.osareports.org/>



The Optical Society
Usage Statistics Portal

Please sign in with your account.

 User ID

 Password

[Sign In](#)

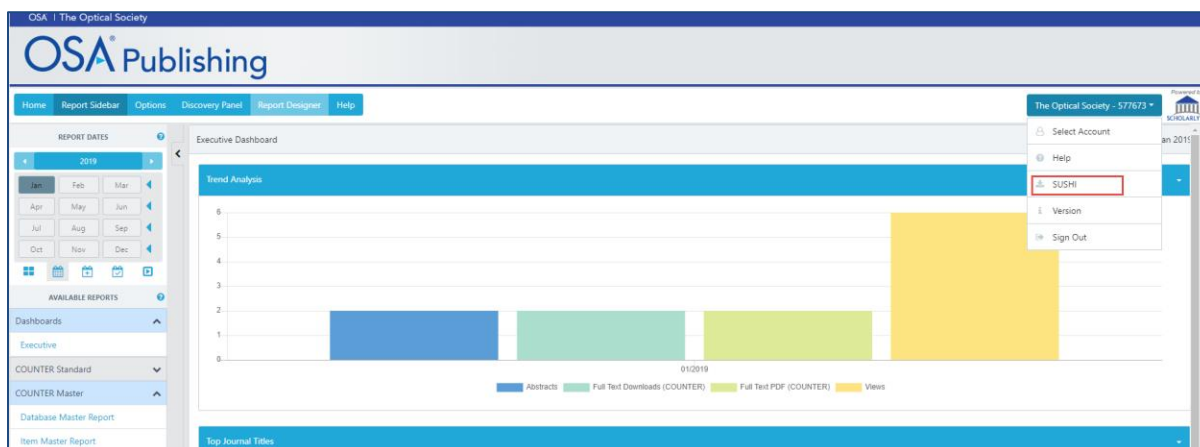
Version: 1.0.373

Powered by
 SCHOLARLY IQ

 COUNTER
AUDIT PASSED

Step 2

Click down your account name and select SUSHI. This will navigate to the SUSHI registration page.



Step 3

Enter your Email, First Name, and Last name. Click Create SUSHI Credentials.

The screenshot shows the 'Create SUSHI Credentials' form. It has three input fields for 'Email', 'First Name', and 'Last Name'. Below these fields is a blue button labeled 'Create SUSHI Credentials'. The form is titled 'Create SUSHI Credentials for The Optical Society - 577673'.

Step 4

You will then be presented with your SUSHI credentials. They will also be emailed to you. You may also download a list of the authorized COUNTER reports supported by OSA.

The required SUSHI account credentials for your institution will include:

Requestor ID:
Institution ID/Customer ID:

Step 5

To then access the OSA SUSHI web service, simply point your own SUSHI client or access software to the following service URL: <https://sushi5.scholarlyiq.com/counter/r5>.

Your SUSHI Client application's "ReportRequest" will require the supplied Requestor ID, Institution ID (Customer Reference) as well as The Report Type, the Report Version (3) and the Usage ranges you want to harvest.

If you have any questions about our service or need some assistance, please contact our support desk at elec@osa.org.

Please refer to COUNTER for further information on harvesting.
<https://www.projectcounter.org/code-of-practice-five-sections/8-sushi-automated-report-harvesting/>